
Quick Reference Guide:

Beginning of Year Verification and Enrollment Collection

This guide explains the basic process for verifying 2014-15 calendars and enrolling students into schools for the 2014-15 school year.

Topics covered in this Quick Reference Guide include:

- *Verifying 2014-15 Calendars*
- *Summer Transfers & Graduates*
- *2014-15 Enrollments*
- *Records Transfer*
- *Data Verification*
- *Sync Data*



More Information:

[AIM New Users Guide](#)

[Job Corps, MT Youth Challenge, and MT Digital Academy](#)

[Creating Households](#)

The Beginning of Year Verification establishes calendars and enrollments for the 2014-15 school year. Schools are required to enroll all students in AIM who attend at least one day of class or who receive Special Education services from the district.



Before beginning, consider the following:

1. What data is entered on the Calendar?

- Calendars need a Start and End Date for the District school year, a Calendar Number, the correct grade levels for the school, and the student Start and End Dates. *page 2*

2. How do I properly exit students who transferred over the summer?

- Delete the student's 2014-15 enrollment and update the 2013-14 End Status to reflect the transfer. *page 3*

3. How do I record Summer Graduates?

- Summer graduates are recorded like regular graduates – change the 2013-14 enrollment End Status to *400: Graduated*, and enter *Diploma Date, Diploma Type* and *Diploma Period*. *page 4*

4. How do I get State IDs for new students?

- Obtain State IDs from the student's prior district or from the Student Locator. Districts may upload a Student Demographic file to locate State IDs, however, using the Student Locator reduces the potential for duplication of IDs. *pages 7-8*

5. What are the correct Enrollment Start Status codes for students?

- Start Status codes should accurately reflect the prior enrollment status of the student. *page 9*

6. Which Enrollment Service Type do I choose?

- Service Type indicates level of educational service the student is receiving from the district. *page 9*

7. How do I send/receive a Records Transfer?

- Process requests for records transfers regularly to facilitate the transfer of Special Education records and prevent enrollment overlaps. *page 12*

8. How do I verify the enrollment data I entered?

- The Student Information reports and Ad Hoc Reporting tools can be used to verify data entry. *page 12*

VERIFYING 2014-15 CALENDAR(S)

Choose *Year* 2014-15 and a *School*.

From the **Index**, expand **System Administration** and **Calendar**. Click **Calendar**.

Verify (and/or enter) the district *Start* and *End Dates* (fiscal year is recommended for SPED data entry). Enter "1" in the *Number* field (if you have more than one calendar per school, each school must have a unique number).

Click **Save**.

Click the **Grade Levels** tab.

Verify the grade levels listed are valid for that school.

NOTE: Grade levels are determined by the OPI, not by the student's schedule or the district's building configuration. Changes to grade levels in a school must first be approved by the OPI.

Click the **Terms** tab.

Click the name of the *Term Schedule* in the **Term Schedule/Terms Editor** box (*Full Year*). (NOTE: If no term is listed in the box, see next page.)

Under *Term Detail*, enter the student *Start* and *End Date(s)* for the *Term*. Click **Save Term Schedule/Terms**.

The **Periods** and **Days** tabs are optional.

Auto Create Term Schedules

Parameter Selection

This Schedule Structure has no terms, and this tool will create some for you. Infinite Campus supports multiple term schedules, but only select the term schedules needed for your schedule. Full-year, semester, and quarter long classes can all be created in a quarter term schedule, so those options are mutually exclusive.

- ☒ Full Year (1 term)
☐ Semesters (2 term)
☐ Trimesters (3 term)
☐ Quarters (4 term)
☐ Other Number of Terms:

0

Create Terms

If no term is listed in the **Term Schedule/Term Editor**, click **New Term Schedule**.

Select a Term Schedule. Click **Create Terms** (the State requires only Full Year – but if you are using the MT Edition for attendance you may need to enter more information).

Follow the previous instructions to enter *Term* dates.

SUMMER TRANSFERS

Adjust enrollments for students who transferred out during the summer.

Example: Student was enrolled in 2013-14 and was expected to return for 2014-15. A 2014-15 enrollment record was created as part of the end-of-year process. The student moved out of state over the summer, and the school received a records request at the beginning of August.

To correct the enrollment record: Select Year 2013-14 or 2014-15 and the school. Click the **Search** tab and enter the student's last name. Click **Go**.

The screenshot shows the 'Banks, Tyra' student record. The 'Search' tab is active, displaying search results for '11 Banks, Tyra [05/13/1998]'. The 'Enrollments' tab is selected, showing a table of enrollment records. The record for 2013-14 is highlighted, showing a status of 180: Transfer to a school out of state.

Year	Grade	Start Date	End Date	Status
14-15	10	09/03/2013	05/31/2014	180: Transfer to a school out of state

Amend the 2013-14 enrollment:

Select the name (appears below the Search Results), then the **Enrollments** tab.

Open the 2013-14 enrollment and change the **End Status** to 180: Transfer to a school out of state.

OPI recommends adding a note in 'End Comments' with the name of the district or school the student transferred to.

Click **Save**.

Delete the 2014-15 enrollment:

Open the 2014-15 enrollment and click **Delete**.

The screenshot shows the 'Enrollment Editor' for Tyra Banks. The 'Enrollments' tab is active, showing a table of enrollment records. The record for 2013-14 is highlighted, showing a status of 180: Transfer to a school out of state.

Edit	Grade	Type	Calendar	Start Date	End Date
11	P	14-15 Granite High School	08/27/2014		
10	P	13-14 Granite High School	09/03/2013	05/31/2014	
09	P	12-13 Granite High School	09/04/2012	05/31/2013	
08	P	11-12 Phillipsburg 7-8	09/05/2011	05/25/2012	

For students enrolled in grades 7-12 only:

If a student did not show up for school as expected in 2014-15 and the district has not received notice or a transfer request, create a one-day enrollment record for 2014-15 in both the district's SIS and in AIM (with *Start AND End Date* the first day of school, *End Status 340: Unknown*). Later, if the district receives notice or a transfer request, change the record as described above for a transfer student.

SUMMER GRADUATES

Adjust enrollments for student who completed graduation requirements after the end of the 2013-14 year, but **prior to** the first day of school in the 2014-15 year. They are counted as Summer Graduates.

Select *Year 2013-14* and a high school. Click the **Search** tab and enter the student's last name. Click **Go**.

Click the **Enrollments** tab. Click to open the 2013-14 enrollment record. Change the *End Status* to **400: Graduated**.

Click **Save**.

The screenshot shows the AIM system interface for student Vanilly, Millie M. The 'Enrollments' tab is active, displaying a table of enrollment records. The record for the 2013-14 school year is selected, and the 'End Status' is set to '400: Graduated'. The 'Save' button is visible at the top left of the enrollment editor.

Edit	Grade	Type	Calendar	Start Date	End Date
<input type="checkbox"/>	11	P	14-15 Granite High School	08/27/2014	
<input checked="" type="checkbox"/>	12	P	13-14 Granite High School	09/03/2013	06/07/2014
<input type="checkbox"/>	09	P	12-13 Granite High School	09/04/2012	05/31/2013
<input type="checkbox"/>	08	P	11-12 Phillipsburg 7-8	09/06/2011	05/25/2012

General Enrollment Information:

Calendar: 13-14 Granite High School
Schedule (read only): Main
Start Date: 09/03/2013
End Date: 06/07/2014
Grade: 12
End Action:
Class Rank Exclude:
Service Type: P. Primary
End Status: 400: Graduated
Dropout Reason:

Click the **Graduation** tab.

Enter the *Diploma Date*, *Diploma Type* and *Diploma Period*.

Click **Save**.

NOTE: The Diploma Period for a student who started grade 9 in the 2010-11 year is *03: Four years or with IEP allowing for longer* if the student completes graduation requirements prior to the first day of school in the 2014-15 year.

September 2014

ENTER 2014-15 ENROLLMENTS

If 2014-15 student enrollments were not previously entered during the End of Year - 2013-14 process, enter them now.

There are two ways to enter 2014-15 student enrollments: 1) Direct Entry and 2) File Upload.

The Direct Entry method requires the district to enter enrollments directly into the AIM database.

Enrollments can either be rolled from the prior year, entered individually by student using the previous year enrollment, or entered using the Student Locator.

**** It is highly recommended that districts use the **Student Locator** to enroll all new students that do not have a State ID already identified.*

The File Upload Method requires the district to create an upload file, either by extracting data from their existing Student Information System or from an Excel template. The [templates](#) are available on the OPI AIM Webpage.

Direct Entry of Enrollments (Option 1 - Rollover)

One option for direct entry of student enrollments for 2014-15 is to roll the students forward from the prior year. You may have already rolled students forward to 2014-15 during the End of Year Process for 2013-14. If not, the rollover process may still be used unless End Dates for 2013-14 have been entered. (NOTE: Once the End Dates for 2013-14 enrollments are entered, the rollover process will not create 2014-15 enrollments for end-dated students, so it can no longer be used.)

If rollover is your preferred option, see the [End of Year Collection guide](#) for instructions.

The screenshot shows the 'Enrollment Roll Forward' tool interface. At the top, it states: 'This tool will promote, retain or demote enrolled students into the next calendar and grade.' Below this is a link for 'Show Detailed Instructions'. The interface is divided into several sections: 'Select Source Calendars' with a list of school and grade combinations (e.g., '13-14 Cascade 7-8', '13-14 Cascade High School'); 'Select Source Grades' with checkboxes for grades 01 through 12, and PK, KF, KH, UE, UH, UM; 'Select Start Status' with a dropdown menu set to '01: First time receiving educational services'; '(OPTIONAL) Select Destination Calendar' with a dropdown; 'Select Destination Grade' with a dropdown; 'Select Destination Structure' with a dropdown; 'Start Date Override' with a text field and a note: 'Not needed if future calendars have Days setup, will chose the first instructional day.'; 'Allow Duplicate Primary Enrollments' with a checkbox; 'Totals Only' with a checked checkbox; 'Show Warnings' with a checkbox; 'Include students whose enrollments end on the last day of the last term' with a checkbox; and two buttons: 'RUN TEST' and 'RUN'. At the bottom, there is a 'Source Ad Hoc Student Filter' dropdown and a 'Source Service Type' section with checkboxes for 'Primary', 'Partial', and 'Special Ed Services'.

NOTE: If you notice a duplicate student ID, contact OPI to correct the situation.

Direct Entry of Enrollments (Option 2 - Update Last Year's Enrollments)

The second option for direct entry of 2014-15 student enrollments is to use last year's enrollments to create an enrollment in the next year.

Select the 2013-14 year and a school. Click the **Search** tab, select *Student*, and **Advanced Search**.

Under **Student Search**, choose a grade level (e.g., start with 09). Click **Search**.

Select the first student by clicking the student's name. Click the **Enrollments** tab. Change the **Year** to 14-15 and select a school.

Click **New**. Enter the 14-15 *Start Date*, *Start Status*, *Grade Level* (for 14-15) and *Comments* (if applicable). Click **Save**.

(See [Start and End Status and Service Types - Notes](#) on page 9.)

Repeat for all students in this grade level. Start over with prior instructions for the next grade. If a student is moving from one school to another (e.g., from Elementary to Middle School), change the school after selecting the student.

Also:

- **Program Participation data and Aggregate Hours** may also be entered for students during this step. Enter the student's Absent Count on or after the Fall Count Date (October 6, 2014).
- **Sort By** (optional) may be entered at this time. See [Sort By Field - Notes](#) on page 9.

Direct Entry of Enrollments (Option 3 - Student Locator)

The third option for direct entry of 2014-15 student enrollments is to use the **Student Locator**. *This is the preferred method to locate State IDs for students who are new to the district.*

To use the **Student Locator**, set the **Year** to 2014-15 and select the correct school. From the **Index**, expand **Student Information**.

Select **Student Locator**.

The screenshot shows the 'Student Locator' window. At the top, there are dropdowns for 'Year' (set to 14-15) and 'School' (set to Granite High School). Below these are tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active, showing a 'Student Search' section with instructions: 'Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new person.' Below the instructions are input fields for 'Last Name', 'First Name', 'Gender', 'Birth Date', 'Middle Name', 'SSN #', and 'State ID'. A 'Search-->' button is at the bottom of these fields. To the left of the search fields is a sidebar menu with 'System Administrator' and 'Student Information' expanded, showing various categories like 'General', 'Program Participation', 'Health', 'Medicaid', 'Special Ed', 'Student Locator', 'Reports', 'Instruction', 'Census', 'Behavior', 'Health', 'Attendance', 'Scheduling', 'Grading & Standards', and 'Programs'.

This screenshot shows the search results for the student 'Haggard, Merle'. The search criteria on the left are: Last Name: Haggard, First Name: Merle, Gender: M, Birth Date: 06/17/2001, Middle Name: (empty), SSN #: (empty), and State ID: (empty). The 'Search-->' button has been clicked. The results table shows one entry:

Name	State ID	Gender	Birth Date	%
Haggard, Merle	736896801	M	06/17/2001	100

 At the bottom of the window is a 'Create New Student >' button.

Enter the student's **Last Name**, **First Name** and **Gender**. Click **Search**.

Use the other identifiers (**Name**, **State ID**, **Gender**, **Birth Date** or **%** which is a wildcard search character) to help identify a match. Hover over the record to see information about the student's last enrollment.

See **Student Locator-Notes** on Page 8.

If the student is located, click the student's name. If the student has never been enrolled in a Montana school, the student name will not appear, so click **Create New Student**. (See [Student Locator](#) - Notes on page 8.)

Enter the **Student Number** (Local ID) – if assigned by the district. Enter the **Identity Info** and **Enrollment Detail** (see screenshot on page 8). The fields in red are required.

This screenshot shows the 'Person Info' and 'Identity Info' sections of the form. The 'Person Info' section has 'Student Number' (5468) and 'State ID' (Pending). The 'Identity Info' section has fields for 'Last Name' (Ghandi), 'First Name' (Mohatma), 'Middle Name' (Lee), 'Suffix' (X), 'Gender' (Male), and 'Birth Date' (12/27/1998). The 'Race/Ethnicity' section has a dropdown for 'Is the individual Hispanic/Latino?' (set to No) and checkboxes for 'Is the individual from one or more of these races?' (American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White, which is checked). The 'Race/Ethnicity Determination' dropdown is at the bottom. Fields for 'Last Name', 'First Name', 'Gender', 'Birth Date', and the 'Is the individual from one or more of these races?' checkboxes are highlighted in red to indicate they are required.

NOTE: Early Kindergarten Entries

MCA 20-7-117 requires that students who have not reached age 5 on or before September 10 of the current school year must have special permission from the School Board to be enrolled in a regular Kindergarten program and counted for ANB. This applies anytime during the year.

For Kindergarten enrollment under 5, please add the Board Approval Date in the Start Comments box on the student's enrollment tab.

Enrollment Detail

*Calendar: 14-15 Granite High School

*Schedule: Main

*Grade: 10

Class Rank Exclude: ☐

*Start Date: 08/27/2014

No Show: ☐

End Date:

End Action:

*Service Type: P: Primary

*Start Status: 06: Transfer from an out of state school

End Status:

Dropout Reason:

Start Comments:

End Comments:

Student Records Transfer

Request a Records Release

This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Student:		Enrollment Type: Primary			
Last Name	Haggard	First Name	Merle	Middle Name	
Gender	M	Birthdate	06/17/2001	SSN	
Grade	10	School	14-15 Granite High School	Start Date	08/27/2014

Requesting District & User					
District	0556 Phillipsburg K-12 Schools	Name	System Administrator	Username	support
Request Date	08/07/2014	Work Phone		Email	
Comments					
<div></div>					

Submit Request

If the student was previously enrolled in another MT district and not previously enrolled in this district, a **Student Records Transfer** request will automatically appear.

When using your personal log-in, your name and phone number (if entered on the **Demographics** tab) will appear under **Requesting District & User**. Enter comments if necessary.

Click **Submit Request**.

Student Locator - Notes

[\(Click to return to text\)](#)

A student who has an existing State ID may not show as a match in the **Student Locator** for a variety of reasons:

- Nickname versus full name (e.g., Jonathan-Johnny, Michael-Mike, Elizabeth-Liz or Beth or Libby)
- Transposed First Name/Last Name or Gender

Try a variety of options before creating a new State ID.

NOTE: If you know a student has an existing State ID but are unable to find the ID using the **Student Locator**, call the student's prior district or the **OPI AIM Helpdesk** at 1-877-424-6681.



Achievement
in Montana
Montana's State Student
Information System



Montana
Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

**Beginning of Year
Collection**

September 2014

Sort By Field - Notes

[\(Click to return to text\)](#)

The **Sort By** field appears at the bottom of the Enrollment tab screen for a student's enrollment record. Entering data into the **Sort By** field is optional.

The **Sort By** field is an additional identifier used for sorting test booklet labels (either ELP or CRT). Districts may enter any label in the **Sort By** field, such as teacher name, team name, room number, or any other sort option desired. Test labels for CRT or ELP will be sorted first by *District*, then *School*, then *Grade*, then *Sort By* field (if entered).

If you intend to use the Sort by label, it is recommended to enter the field during the enrollment process.

Start Status and Service Types - Notes

[\(Click to return to text\)](#)

Start Status codes should accurately reflect the last active enrollment of a student. A complete list of codes is defined in [Appendix A](#). A few common examples include:

- Student was previously enrolled in a home school - **Start Status** is *09: Transfer from a home school in state*.
- Student was previously enrolled in a private school in another state - **Start Status** is *06: Transfer from an out of state school*.
- Use **Start Status 01: First time receiving educational services** only if the student was never enrolled in any type of school. Kindergarten students are always *01: First time receiving educational services*, unless they were enrolled in a public school's PK program for Special Education services or they are repeating Kindergarten.

Service Types should accurately reflect the type of service the student is receiving from the school.

P: Primary - Student is enrolled in the school to receive education services

N: Special Ed Only - Student receives Special Education Services (PK students or students concurrently enrolled at a private or home school)

S: Partial (Secondary) - Student is primary enrolled in another school but participates in an accredited educational program at a this school



File Upload of Enrollments (Option 1 - Extract File)

The first option for using the File Upload method is to create an extract file from the district's Student Information System in the *.TVs or *.txt format.

Perform the Student Demographic file upload first, followed by the Enrollment file upload.

From the **Index**, expand **MT State Reporting**. Select **MT Data Upload**. From **Import Type**, select **Student Demographics**. Under **Work to Perform**, select **Validate and Test File**. Browse for the *.tsv or *.txt file.

Click **Upload**.

THIS STEP IS CRITICALLY IMPORTANT!

Check the **Import Results Summary** for *Errors* and *Warnings*.

- *Errors* MUST be corrected before uploading.
- *Warnings* are messages about potential issues with uploading students – please check these thoroughly and do not load the file until all issues are addressed.
 - If *Warnings* state “No matching student found”, see special instructions on next page before proceeding.
- When all *Errors* have been cleared and *Warnings* checked, change the **Work to Perform** to **Load Partial File**. The **Import Type** should be **Student Demographics**.
- Browse for the file and click **Upload**.

Results:
 File Name: test.txt
 Processing Started Time: Mon Aug 25 13:07:04 CDT 2014.
 Processing Finished Time: Mon Aug 25 13:07:04 CDT 2014.
 Total Time To Process File: 0.577 seconds.

0 Records Inserted.
 0 Records Changed.
 0 Records Deleted.
 0 Records No Changes.

Error Count:0
Warning Count:2

Error Detail:
 Line Number Error Message Content
 No Errors

Warning Detail:
 Line Number Warning Message
 2 No matching student found. A new state ID will be generated upon 'Load Parti
 3 No matching student found. A new state ID will be generated upon 'Load Parti

Repeat the process for the Student Enrollment file, choosing **Index**, **MT Data Upload**, and from **Import Type** select **Student Enrollment**.

Warning - No matching student found

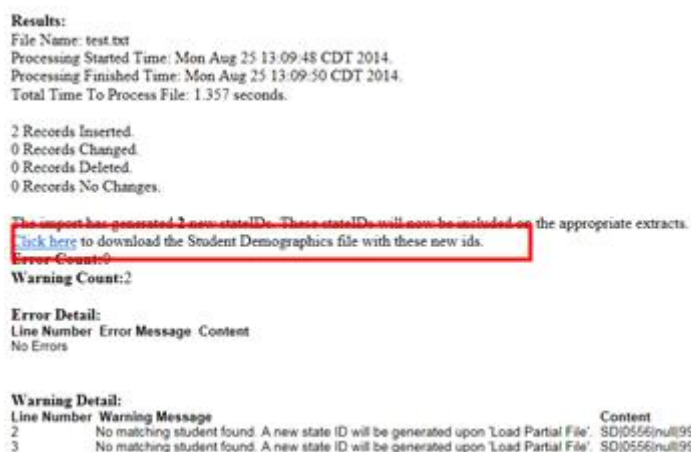
If the Warning Detail lists “No matching student found”, AIM will create a new state ID for the student when the Student Demographics file is uploaded.

- Do not upload the Student Demographics file if you think there is already a state ID for this student, to avoid duplication. Instead, check the student locator to identify the ID, or call the AIM Helpdesk at 1-877-424-6681 for assistance.
- (This must be done BEFORE uploading the Student Enrollment file)* If a state ID is needed, upload the Student Demographics file and save the report of new state IDs that AIM generates (instructions below). Use the file of new IDs to uploaded into the district SIS, or enter the IDs manually in the SIS.

To capture the file of new state IDs:

When after uploading the Student Demographics file (page 10), AIM displays the upload status report. The report contains a link to download the file with new IDs. **Click** *Click Here*.

The report shows the new state IDs. Save the file for future reference, and enter the information in the SIS using a file upload or manual entries.



HD	08/25/2014	13:23:11	MT9.1						
SD	0556	367671360	9991057	Moreo	Charles Dean	M	06/07/1996	N	N
SD	0556	888205549	9990065	Paxini	John wayne	M	10/25/1996	N	N

Another option is to use templates to create an Excel file of enrollment data and convert it to the format needed to upload into AIM. The **Student Enrollment Template** and **Student Demographic Template** are available on the OPI AIM Webpage ([templates](#)).

Open the **Student Demographic Template**.
Enter the required information (shown in red)
for each student.

Follow the instructions to upload the file (see Option 1 above).

Repeat for the **Student Enrollment Template**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	DELETE rows 1, 2, and 3 prior to saving as a text/tab delimited file.																		
2	Fact 1	Fact 2	Fact 3	Fact 4	Fact 5	Fact 6	Fact 7	Fact 8	Fact 9	Fact 10	Fact 11	Fact 12	Fact 13	Fact 14	Fact 15	Fact 16	Fact 17	Fact 18	Fact 19
3	Record Type (10)	District Number	Student's State ID	Student's Local ID	Last Name	First Name	Middle Name	Suffix	Gender	Birth Date	Tribal	Hispanic/Latino?	American Indian or Alaska Native	Asian*	Black or African American*	Hispanic or Other Pacific Islander*	Other*	Race/Ethnicity Determination	Resident
4																			
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43																			

HO	08/01/2011	15:48:21	MTS-1			
SD	0280	119459608	50	Paisley Brad	Trisha	M 02/03/2004
SD	0280	125662052	68	yearwood		F 03/19/2001
SD	0280	149915791	64	willis Bonnie		M 01/24/2004
SD	0280	166135951	64	williams	Hank	Jr M 04/24/2002
SD	0280	180735107	47	Lynn Loretta		F 12/20/2003
SD	0280	188415691	15	Seals		F 02/23/2006
SD	0280	190309537	12	Brooks Garth		M 09/05/2006
SD	0280	192599033	28	gill Vince		M 04/23/2001
SD	0280	196400321	54	Rich Charlie		F 01/08/2002
SD	0280	210904318	17	Cartier June		F 08/10/2003
SD	0280	212117740	67	Judd Wynonna		F 05/10/2005
SD	0280	214063709	52	Harris Lou		F 10/27/2001
SD	0280	218199532	52	Pickler Kellie		F 12/05/2005
SD	0280	223236465	37	Krauss Alison		F 11/15/2005
SD	0280	240185925	70	Grown Zac		M 03/10/2004
SD	0280	250939665	46	Montgomery	John Michael	M 02/12/2003
SD	0280	2801909467	43	Mccoy Neal		M 11/27/2004
SD	0280	280785615	40	Marish		F 06/05/2001
SD	0280	28077795	22	Carey David	Allen	M 10/29/2005

RECORDS TRANSFER

Records transfers are only required for students who have Special Education records in the prior school district. However, it is recommended that districts use the Records Transfer for all students who transfer into the district in order to view student enrollment histories and LEP data.

Refer to these guides on the OPI AIM Webpage at http://opi.mt.gov/Reports&Data/AIM/#p7GPc1_2:

[Records Transfer](#)

[Records Transfer for AIM Administrators](#)

Huxtable, Theodore
Grade: 10 DOB: 12/01/1998 Gender: M

Summary	Enrollments	Schedule	Attendance	Flags	Grades	Transcript
Credit Summary	Assessment	Behavior	Graduation	AdHoc Letters	Records Transfer	

New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District
08/07/2014	Huxtable, Theodore	request	Cascade Public Schools	

DATA VERIFICATION

The first step in the data verification process is to make sure the data is correct at the district level! This may involve a dialogue with specific program staff, including the Title I Director, SPED Director, lunch staff, etc.

If the data in the district's Student Information System is incorrect, the data in the MT Edition will likely be incorrect as well.

Once the enrollment data is transferred to AIM (either by direct entry or file upload), there are numerous tools in Infinite Campus to verify data, including the **Student Information Reports** and the **Ad Hoc Reporting** tools.

The following sections explain how to use these data verification reports to verify data accuracy and completeness.



Index Search Help <

System Administrator

▼ Student Information

General

► Program Participation

► Health

Medicaid

► Special Ed

Student Locator

▼ Reports

Caseload Summary

Duplicate IDs

Enrollment Loss Report

Enrollment Overlap

Enrollment Status

Enrollment Summary

File Labels By DOB

Folder Labels by DOB

No Show Report

Process Compliance

Service Detail

Student Information Reports

From the **Index**, expand **Student Information/Reports**.

These reports are useful for verifying enrollment data:

The Student **Enrollment Status** report lists students by name, according to set criteria. You can choose parameters for the report.

Student Enrollment Status

This report lists students' enrollment start/end status and mailing address. The default calendar year is the current selected calendar.

Which students would you like to include in the report?

☒ Grade ☐ Ad Hoc Filter

Grade:

Enrollment Add Date: From To

Enrollment Drop Date: From To

Display Options: ☒ Start Date ☒ End Date

How would you like the report sorted?

☒ Alpha ☐ Grade ☐ Student Number

Which enrollment status would you like to include in the report?

Start Status:

Ad Hoc Reporting

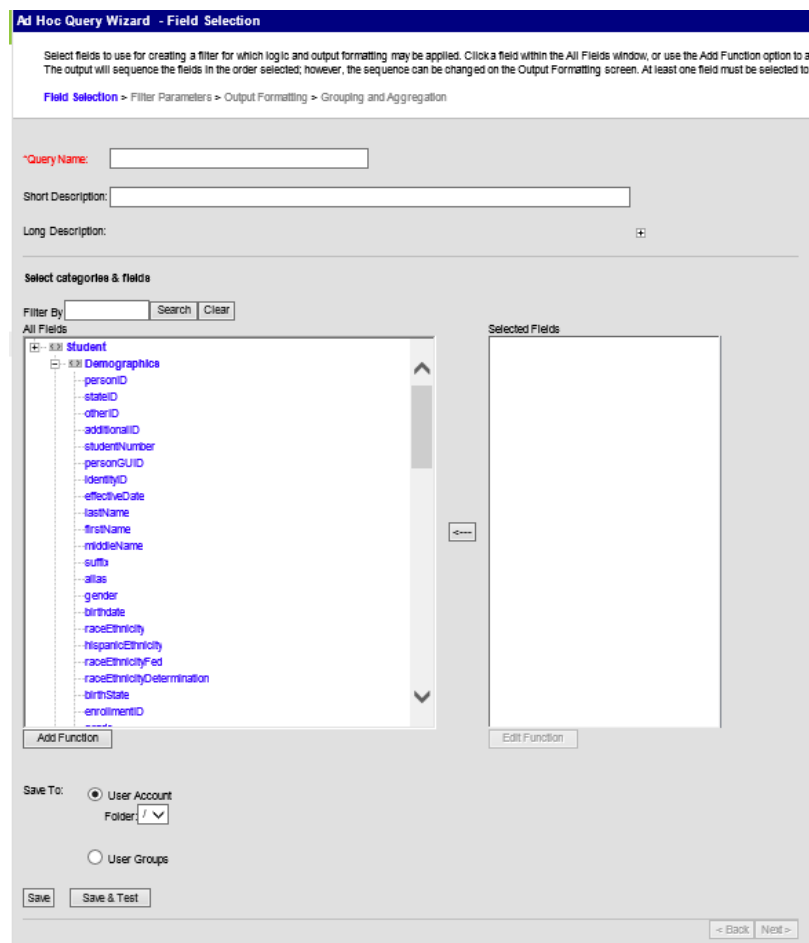
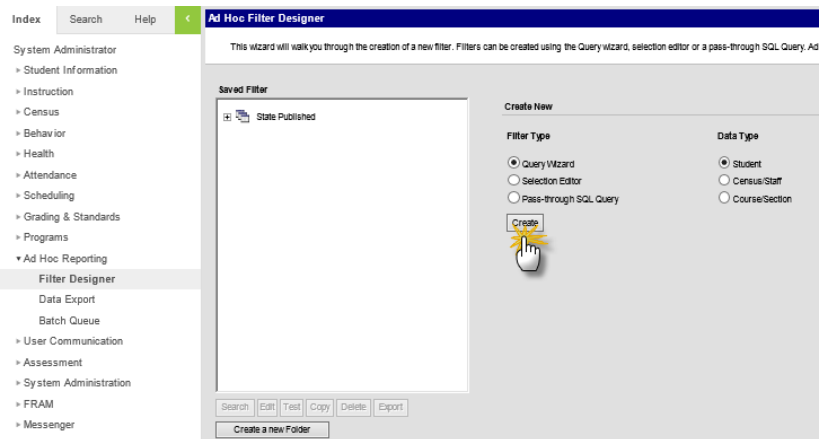
The **Ad Hoc Reporting** tool can also be used for data verification. The tool can be used in two ways: 1) Select filters to generate query reports; and 2) Select from State Published (i.e., “canned”) reports for checking various requirements to avoid common errors.

To select your own filters/query:

From the **Index**, expand **Ad Hoc Reporting**. Select **Filter Designer**.

To create a new filter, select *Create a New Filter using the Query Wizard* and **Data Type Student**.

Click **Create**.



Select the fields to include in the report. Expand /contract the field groups by clicking the plus (+) or minus (-) signs. To move a field to the **Selected Fields** box, click the name of the field.

To search for fields, type in all or part of the field name in the *Filter By* box.

Once the fields are all in the **Selected Fields** box, click **Next**.

Give the query a name, a short description (optional) and enter any applicable filter data. Click **Next**.

Ad Hoc Query Wizard - Filter Parameters

*Query Name: Enrollment Query

Short Description: Shows enrollments for all students enrolled

Long Description:

Filter the data

Field	Operator	Value
student.stateID		
student.lastName		
student.firstName		
student.gender		
student.birthState		
student.grade	IN	01
student.startDate		
student.startStatus		
student.endDate		
student.endStatus		

Save To: ☒ User Account
Folder: /

☐ User Groups

Save Save & Test

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If additional sequencing or sorting is desired, enter the information into the corresponding fields. Click **Next**.

Ad Hoc Query Wizard - Output Formatting

*Query Name: Enrollment Query

Short Description: Shows enrollments for all students enrolled

Long Description:

Format the output file/report.

Field	OutputSeq	Sort	Direction	Column Header	Alignment	Formatting	Length
student.stateID	<input checked="" type="checkbox"/>						
student.lastName	<input checked="" type="checkbox"/>	1	Ascend				
student.firstName	<input checked="" type="checkbox"/>	2	Ascend				
student.gender	<input checked="" type="checkbox"/>						
student.birthState	<input checked="" type="checkbox"/>						
student.grade	<input checked="" type="checkbox"/>						
student.startDate	<input checked="" type="checkbox"/>						
student.startStatus	<input checked="" type="checkbox"/>						
student.endDate	<input checked="" type="checkbox"/>						
student.endStatus	<input checked="" type="checkbox"/>						

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Ad Hoc Query Wizard - Grouping and Aggregation

*Query Name: Enrollment Query

Short Description: Shows enrollments for all students enrolled

Long Description:

Group the data into sections that can have aggregates/sub-totals

Grouping	Group by	Group Order
Tier 1	student.grade	Ascending
Tier 2		Ascending
Tier 3		Ascending
Tier 4		Ascending
Tier 5		Ascending

Aggregate/Sub Total by Aggregate Type

Aggregate Type	Aggregate Type

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To group students by a selected identifier, choose the correct grouping.

Click **Save**.

Data Export Wizard

This wizard will dump the result of a filter into a data file (csv, tab delimited, xml) or a simple list report.

Saved Filters

- student Enrollment Query

Enrollment Query

Pick an Export Format

- ☒ HTML list report
- ☐ XML
- ☐ Delimited values (CSV)
- ☐ Fixed width
- ☐ PDF report

Search Edit Copy Delete

Create a new Folder

Export

To run the report using the filter just created, under **Index**, expand **Ad Hoc Reporting** and select **Data Export**.

Choose the **Saved Filter** and **Export Format**.

Click **Export**.

Alternatively, run the report by using the **Advanced Search** method:

Choose a **Year** and **School**. From the **Search** tab, click **Advanced Search**.

Locate the filter you created, which should appear in the list under **Saved Filter**. Click **Search**.

The results will display under search results.

Campus Search

Year: 11-12 School: Cascade 7-9

Search for a: Student

Advanced Search >>

Search Results: 1

07 Obama, Malik A [07/04/1998]

Student Search

Last Name: First Name: Student Number: SSN: Grade: Birth Date: Gender: StateID: Person ID: Locker Number: Special Ed: Status: Setting: Disability: Search

Saved Filters

Enrollment Query

Search Edit Copy Delete

Create a new Folder

Run the State Published reports

Choose a **Year** and **School**. From the **Search** tab, click **Advanced Search**.

Under **Saved Filter** expand the **State Published** list. **Select** a report (see list below) and Click **Search**.

Campus Search

Search for a record being tracked in Campus by using search fields or by selecting a Saved Filter. If you have created a Saved Filter and do not see it in the list, you cannot be applied to a Census Person Search. You may search school-wide.

Student Search

Last Name: First Name: Student Number: SSN: Grade: Birth Date: Gender: StateID: Person ID: Locker Number: Special Ed: Status: Setting: Disability: Search

Saved Filter

- Pending State Published Filters
- School Users Filter Share
- State Published
 - Active Students
 - ADA - Days Present or Days Enrolled is Null
 - ALL Kindergartners with N Service Type
 - ALL Preschoolers Not with N Service Type
 - Attendance - Students marked as Absent as of
 - Attendance Test Window Count - Missing Agg H
 - BOY Dropouts by Grade Level, Name
 - BOY Graduates by Name
 - BOY Graduates Missing Diploma Information
 - BOY PK 2013-14 Students who need end dates
 - Copy of LEP missing Identified Date
 - CTE Concentrators
 - CTE Missing Post Grad Status or Date Contacted
 - Current General Race Ethnicity
 - Current Gifted/Talented Students

All Users should run these State Published reports:

ALL Kindergartners with N Service Type - (Be sure to select *Year 14-15*) This report shows kindergarteners who have a 2014-15 enrollment with a service type of N, which signifies the student receives special education services only (i.e., no educational services). Most kindergarteners (including those with special ed services and those without special ed services) should instead have service type P (primary educational services). This error usually occurs when PK students with N service type are rolled into the new year for enrollment, carrying the N service type along. Review the report and amend the kindergarten student enrollment records as needed to change the N service type to P.

ALL Preschoolers Not with an N Service Type - (Be sure to select *Year 14-15*) This report shows preschool students who have a service type other than N. All preschoolers attending a special education preschool program should have N service type, which signifies they receive special education services only (i.e., no educational services). Review the report and amend the preschool student enrollment records as needed to enter the N service type.



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<input checked="" type="checkbox"/>	<input type="checkbox"/> StudentRecordElement	06/17/2014 15:49:51	Processed: 3 Errors: 0	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/> PersonIdentity	06/17/2014 15:49:51	Processed: 198 Errors: 0	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	BehaviorType				
<input type="checkbox"/>	BehaviorResolutionType				
<input type="checkbox"/>	BehaviorResponseType				
<input type="checkbox"/>	Behavior				
<input type="checkbox"/>	CensusContactSummary				
<input type="checkbox"/>	ContactLog				
<input type="checkbox"/>	Employment				
<input type="checkbox"/>	EmploymentAssignment				
<input type="checkbox"/>	EmploymentBackground				
<input type="checkbox"/>	EmploymentCredential				
<input checked="" type="checkbox"/>	<input type="checkbox"/> Enrollment	06/17/2014 15:49:51	Processed: 181 Errors: 0	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Graduation				
<input type="checkbox"/>	Roster				
<input type="checkbox"/>	AttendanceMTSnapshot	01/17/2014 09:42:29	Processed: 181 Errors: 0	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Evaluation				
<input type="checkbox"/>	Form				
<input type="checkbox"/>	HealthScreening				
<input type="checkbox"/>	ImmCertificate				
<input type="checkbox"/>	LEP				
<input type="checkbox"/>	LegService				
<input type="checkbox"/>	LegAccommodation				
<input type="checkbox"/>	MedicaidInsurance				
<input type="checkbox"/>	POSEligibility				
<input type="checkbox"/>	ProgramParticipation				
<input type="checkbox"/>	PublishedTabCustomStudent				
<input type="checkbox"/>	<input type="checkbox"/> TeamMember				
<input type="checkbox"/>	<input type="checkbox"/> Plan				
<input type="checkbox"/>	PlanProgressReport				
<input type="checkbox"/>	<input type="checkbox"/> Test				
<input type="checkbox"/>	TestScore				
<input type="checkbox"/>	TranscriptCourseSE				
<input type="checkbox"/>	VaccineShot				
<input type="checkbox"/>	PersonIdentityNoStateIDOnly				

Send Resync

SYNC DATA

A data sync is required for all file uploads. It is recommended to sync data before collection due dates.

This process syncs the data from Montana Edition and District Edition schools to the State for use in state reporting.

From the **Index**, expand **System Administration/Data Utilities/Resync State Data**. If syncing data from the 2014-15 year, set the *Year* to 2014-15. If syncing data from the 2013-14 year, set the *Year* to 2013-14.

To sync **Enrollments** check the box for *Enrollment*. All connected data elements will automatically populate. At the bottom, click **Send Resync**.

The green radio buttons indicate a successful resync of data, and a message will appear in the **Process Inbox**.

<input type="checkbox"/>	EmploymentCredential			
<input checked="" type="checkbox"/>	Enrollment	06/11/2014 12:25:33	Processed: 184 Errors: 0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Graduation			
<input type="checkbox"/>	Roster			

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Enrollment Verification Report

This report will communicate with the state edition server to compare local enrollments with the data then generate a report that summarizes any differences.

Select Which Enrollments To Include

Selected School Year: 2014

Schools: All Schools, Granite High School, Phillipsburg 7-8, Phillipsburg School

State Grade: All Students, K-1, P-1, PK, D-1

Exclude Enrollments Matching Any Of These Additional Criteria

Calendar Excluded: ☒

No Show: ☐

State Excluded: ☒

State Exclude Grade Levels: ☒

State Unmapped Grade Levels: ☒

Select The Enrollment Fields To Compare Between District And State Edition

☒ State Grade Level
☒ Service Type
☒ Start Date
☒ End Date
☒ Start Status
☒ End Status
☒ Schedule
☒ No Show (If Included)
☒ Next Calendar
☒ Next Schedule
☒ Next State Grade Level
☒ End Action

Report Display Options

Show Summary Totals: ☒

Show Enrollments Missing At State: ☒

Identify students missing at state due to overlap prevention: ☒

Show Enrollments Missing At District: ☒

Show Enrollments With A Field Difference: ☒

Show Value At District And State Of Each Difference: ☒

Generate Report

Enrollment Verification Report

After syncing enrollment data to the State, run the Enrollment Verification Report to check for differences between data entered in the MT Edition application and data that has synced to the State.

From the **Index**, expand **Student Information/Reports**. Select **State Enrollment Verification**.

There are a number of options and fields to choose from. Choose the items to verify, and click **Generate Report**.



Enrollment Verification Results

The Enrollment Verification will compare all enrollment records existing at the district and state in the school year selected for verification. The Details column of the report may suggest a reason related to record differences.

Enrollment Sync Rules

Local and/or state-level settings may intentionally prevent syncing of certain enrollments. The following criteria can prevent enrollments from syncing:

- Individual Enrollment marked as state exclude
- Grade Level marked as state exclude
- System Preference - Enrollment Overlap Behavior ("Strict Prevent with Syncing" value only)
- System Preference - Accept State Excluded Grade Levels and Enrollments ("No" value only)
- Unmapped State/Regional Grade Levels

The success of Enrollment object syncing depends on the successful syncing of these parent objects:

1. District
2. Reporting Entity*
3. School
4. Calendar
5. ScheduleStructure
6. StructureGradeLevel
7. PersonIdentity

*Localized object, not applicable to all customers

District Verification Summary

Total	District Count	State Count	Missing At State	Missing At District	With Field Difference
Philipsburg K-12 Schools - ALL	184	184	0	0	0
13-14 Granite High School	71	71	0	0	0
13-14 Philipsburg 7-8	33	33	0	0	0
13-14 Philipsburg School	80	80	0	0	0

District Records Missing At The State

Student Name	State ID	District Enrollment ID	Start Date	Grade	Start Status	Details
No Differences						

State Records Missing at District

Student Name	State ID	District Enrollment ID	Start Date	Grade	Start Status	Details
No Differences						

Records Having Different Values At State

Student Name	State ID	District Enrollment ID	Start Date	Grade	Start Status	Details
No Differences						

**If differences do not resolve after a resync, contact the
OPI AIM Helpdesk at 1-877-424-6681 or opiaimhelp@mt.gov for
assistance.**

